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Project Pointers

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An old friend recently shared the following quotation by Terri Guillemot:

**"The color of springtime is in the flowers;
the color of winter is in the imagination."**

And this is where January finds so many of us, quietly considering new ways to deliver services and improve effectiveness. At the conclusion of the busiest year of my professional life, I reserved unstructured time for brainstorming and various business tasks. This slower period resulted in new ideas for both my clients and me. I learned once again how often creative energies pop up when least expected.

As we begin 2012, I wish all of you imaginative, "aha!" moments of productivity and enjoyment.

Benefits of Cross Training

This edition of Project Pointers concludes the succession series by reviewing cross training, a powerful tool for smooth transitions. As we experience winter's moments of imagination...imagine calmer days because staff members fulfill new roles as needed!

At its heart, cross training reflects a learning culture and is most effective when this foundation exists. If the offering is presented as a learning opportunity that allows for flexibility and even security, employees are more likely to embrace it. The cross training goals should be part of each employee's annual professional development plan, one that allows them to experience a variety of duties and departments. Such training reduces boredom, increases motivation,

promotes teamwork and minimizes conflicts between departments. It also makes it easier for employees to think about the entire organization instead of their immediate service area only.

Organizational benefits also result from this type of training. Recruitment and retention improve, vacations and illnesses are easier to manage, and employee loyalty is stronger. Simply, cross training provides more flexibility within the nonprofit, especially valued during the current economic climate.

Getting Started

As you consider instituting a cross training program, certain planning guidelines will be helpful. First, keep in mind that the goal is continuity of service, an outcome that can easily get lost in the details. Cross training should be developed for the entire organization and cover all skill sets. It also must align with the strategic plan and support any other succession planning activities. As part of the strategic vision, the board should approve and support the training plan goals and commit adequate resources for its implementation.

Next, determine the weakest area of the organization. What department or function would be hardest hit if someone left? What would not function well? What missing skill set would most affect the ability of others to perform their duties? So often, succession considerations never move past the CEO and vice president level, a short-sighted view.

In general, it is wise to begin with all of the supervisory positions in the organization. This not only sets the expectation for the entire staff to shift to cross training, but it also serves as a perfect opportunity to evaluate the effectiveness of certain supervisors. It is not unusual for a staff member to "select out" of a role as part of the new training initiatives. The entry-level positions are often addressed last when those staff can benefit from their supervisors' enhanced skills and any related changes.

Creating the Plan

Several years ago, the Yale University Library conducted research before creating its own cross training program. This work resulted in an excellent report that also brought lessons for the human services community. Five program elements were recommended:

1. **Training scope.** This includes the specific tasks and workflow that will be most valuable to the individuals, as well as the training schedule, including total hours and frequency. The number of staff, positions and specific skill sets also comprise the scope. Employee contact information must also be listed.

2. **Objectives**. This element outlines what participants will do and understand as a result of the training. The expected outcomes of training must be clear and may include enrichment, mastery, skill building, etc.
3. **Content development**. The alignment of the organization's cross training and strategic plan are explained in this section. In most cases, reviews of the policies and procedures that may impact training are set forth. The content must also outline the opportunities for practice and follow-up as well as any recommended pre- and post-testing or other testing. A communication plan is also described in this program element.
4. **Training methods**. As we know, adults learn best by doing and using a variety of learning methods, so the plan should include complementary, flexible strategies. The library research suggests a mix of one-on-one instruction and one-on-one instruction with individual coaching support. In addition, small group training, followed by coaching in some cases, is recommended. Increasingly, web or other media may deliver some of the content. There is no single best vehicle--what matters is that the methods are outlined in the plan.
5. **Evaluation**. As always, measures of success must be tied to objectives. These may include self-evaluation or evaluation by the trainers. A structured discussion between the participants and the teacher may be helpful; some organizations use structured small group discussions extensively. What matters is the process and the clear expectation that measurement will occur. Typically, the evaluation element also identifies ways to improve training or select new topics.

A successful cross training program rounds out the succession planning mix. This tool complements the emergency and planned departure documents and processes reviewed in previous newsletters. Taken together, they promote order, reduce risk and allow staff and volunteers to better focus on clients.

Best wishes for the new year,



Federal Grants: Ready, Set, Go!

Tuesday, February 28, 2012 - 9:30 AM to 4:00 PM

A repeat of this well-received workshop will be offered by the Health Foundation of Greater Cincinnati.

This workshop will benefit decision-makers from small and mid-sized nonprofits who are considering or preparing for federal grants. Both CEOs and development staff will learn new ways to approach and secure federal grants - attending as a team will improve opportunities.

As part of the day-long workshop, Marta will address organizational readiness and three other presenters will deliver solid content related to securing federal grants.

Register on line at: [workshop registration](#)

Successful Project Management

Marta's popular *Successful Project Management* Workshop will be offered from 9:30 AM - 12:30 PM on:

**Tuesday, March 20, 2012
Tuesday, December 4, 2012**

These workshops will be held at The Health Foundation of Greater Cincinnati, 3805 Edwards Road, Suite 500, Cincinnati, OH 45209.

Register online at: [workshop registration](#).

Repeat Tip for the New Year (Someone asked!)

For every piece of paper in your office, ask the following questions:

1. Do I really need to keep this?
2. Where should I keep it?
3. For how long should I keep it?
4. How can I find it?

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